

ANDREA MITCHELL
RETAIL
MERCHANDISER



1

ANDREA MITCHELL

Andrea is a retail merchandiser and works for one of the largest printer companies in the United States. She works in the Bay Area with a concentration in the East Bay, including Oakland and Walnut Creek along with the neighboring communities. She is on the road every day visiting different electronics stores to determine if the printers are properly displayed and stocked. She also is busy building relationships with the store managers so that she can get new merchandise displays and promotions up in the stores.

Andrea does not visit her corporate office in Union City that often. She mostly works out in the field and from her laptop computer at home. She has a weekly meeting with her colleagues but that is all done through a conference call.

Andrea is 35 years old and has 6 years of industry experience as a retail merchandiser. She has been in her current position for two years.

She has a bachelor's degree in Marketing.

In Andrea's free time, she likes attending parties with her friends, going shopping, watching movies, and taking photographs.

PERSONAL CHARACTERISTICS

Andrea has a laid-back personality but still focuses on efficiency in getting her job done.

Her characteristics include:

- She has an even temper, which makes it easy for her to communicate with store managers.
- She likes the routine of her job as long as it gets done in the most effective way. She gets frustrated easily when store layouts do not make sense or her tools provided by her company slow her down.
- Andrea is bit of an introvert and this job lets her do her own thing without being bothered much.

According to Andrea...

“I do my own thing, people don’t bother me.”





ANDREA'S TECHNOLOGY PROFILE

Andrea uses a smartphone for work to get her job done, but she thinks her company is not investing enough in the applications to make it most efficient for her to use.

Andrea is mobile savvy and uses her personal mobile device for everything from staying connected with friends and family as well as for entertainment purposes. Her company provides her a mobile device to use for work for tracking her visits to each of the individual stores she visits. She is thankful to have the mobile device to get her work done, however, she sometimes thinks that things take longer than they should because the applications and business processes are not always optimized for the mobile phone.

According to Andrea...

“A tablet is an entertainment device.”

ANDREA'S DEVICES



Mobile: Andrea has an HTC incredible that she uses for work and personal use. Her company pays for the device and pays a set amount each month to offset her costs.



Tablet: Andrea has a Kindle Fire that she uses mostly for entertainment purposes such as watching movies, surfing the Internet, checking her Facebook, and reading online books.



Laptop: Her laptop is an Acer netbook. She only uses this at home before she heads out to the stores or when she returns at the end of the day.

Other Technologies:
MP3 player, Bluetooth headset

WORK PLACES

Andrea is out in the field every day during the week. She spends almost 80% of her work week visiting stores. The other time she spends at home usually on her laptop following up on her day's activities.

Her work locations include:

Car: She uses her car to get from store to store each day

Stores: She visits large electronic stores to check on the merchandise and displays.

Home: She uses her laptop to log into the system to enter any information about a store visit that she might not have entered while on the go. She finds it cumbersome to set up her laptop and get it connected so often she still relies on her mobile device while she is at home. In addition, using her smartphone means she doesn't have to go through the trouble of printing out store lists and routes from her home printer.

According to Andrea...

“I like this job because I can do things on my own time, and not have to worry about a routine.”



JOB RESPONSIBILITIES

Andrea needs to be efficient at her job and make sure she does not miss steps when visiting each store. Her company is monitoring which stores she visits, if she checks on everything she is supposed to at each store, and how long she is at each store, and if she is increasing the number of displays and promotions in the stores.

Her job responsibilities include:

Check product inventory: Makes sure that the inventory on the shelves is not low in the stores. She orders products when the inventory is low. If there is no merchandise on the shelves then people will not be able to buy their products.

Ensure products are displayed correctly: Andrea checks to make sure the correct products are in the correct places on the shelves. She makes sure that the model numbers are accurate and that the appropriate product information is displayed.

Checks on the displays and promotions in the stores: Checks to make sure displays such as end caps are located where they are supposed to be. She also checks to make sure that promotional information is not expired.

Increase number of displays and promotions in stores: Meets with store managers to convince them to put up new displays or promotional signs. She spends time convincing store managers that sales will increase if they add additional displays and promotional materials of her products.

Track store visits: She needs to make sure she is tracking what happens during each visit in each store. Her company regularly runs reports to monitor how much merchandise has been purchased, if displays are up correctly, and if new displays and promotions are being added to stores. They use the information from the call report that she fills out for each store she visits.





LAPTOP TASKS

Andrea mainly uses her mobile device but uses her laptop for some tasks.

Laptop tasks include:

- Check email
- Review what stores she is visiting the next day
- Log into the enterprise application to manage daily store visits that she did not do while in the field
 - Add any additional notes as to what happened at a store
 - Order products for the store
- View displays, collateral, and other company promotions



MOBILE WORK TASKS

Andrea's mobile device is her lifesaver while she is out in the field. It helps her in each step of the process as far as knowing which store to visit, how to get to the store, and documenting what happened when she is in the store. It has really increased productivity by allowing her to access information anytime from anywhere and order fulfillment is quicker because she can order the products at the store location rather than at the end of the day.

Smartphone tasks include:

- Make and respond to calls, SMS messages, and IM messages
- Read and reply to email messages from colleagues and stores
- View store lists to see what stores she needs to visit each day
- Takes pictures of competitor displays, problems with store displays, and products that are displayed well
- Uses barcode scanner on smartphone application to check inventory of the product
- Order products when they are needed
- Accesses store diagrams of where the merchandise is supposed to be displayed
- Use map and GPS applications to get to store locations
- Access online collateral of displays and promotions while on the road
- Document what happened when visiting a store
- Tracking time in store
- Signature capture of the store manager

According to Andrea...

“My phone is a one-stop-shop.”

MOBILE PERSONAL TASKS

When Andrea is not using her smartphone for work, she is using it for personal reasons. She seems to always be grabbing her phone for something whether it is to help her be productive, communicate with her friends and family, or keep herself entertained when she has some downtime.

Smartphone tasks include:

- Make phone calls and text message family and friends
- Look up directions, GPS (Using Waze application)
- Take pictures of friends and family
- Post pictures to Instagram and Facebook
- Email friends and family
- Looking up information such as weather
- Using Facebook and Twitter to get information and post information to my friends and family
- Listen to music (Pandora)
- Track finances (mint.com)
- Read books

Tablet Tasks:

- Reading books, magazines, news
- Watching movies
- Playing games
- Social media, usually Facebook



MOBILE PAIN POINTS

Even though Andrea finds her smartphone very beneficial, there are a few frustrations she faces.

Frustrations include:

- Andrea has to download the stores she is going to visit to her phone on a daily basis rather than them just showing up on her device.
- Andrea has a lot of information to enter while at an individual store. Currently her process is a bit complicated having to enter a lot of text and access different information from different systems. For example promotion materials are in one place, store diagrams in another place, checklists in another place.
- Wishes her enterprise app could use the phone's GPS information to figure out distance and time traveled, as well as time spent at a given store. Alternatively, it could prompt her to start the timer when she enters the store, and mileage and time could be pre-populated based on GPS data.
- Enterprise application should be able to give point-to-point directions for her day.

According to Andrea...

“GPS routes for multiple stores could be a lot better, and would make my life easier.”





2

A DAY IN THE LIFE OF ANDREA MITCHELL

8:15 am Andrea starts her day by downloading a list of the stores she needs to visit for the day onto her mobile device.



8:20 am She notices that a new store opened in West Oakland. It is critical for her to visit new stores when they open to ensure that they have everything appropriately stocked and displayed. She decides to visit that store first.

8:23 am Andrea uses the GPS mapping functionality on her phone to determine where this store is lo-



cated. She then uses the GPS map routing functionality to map out a route of the other stores on the route by closest distance.

8:30 am She starts the car and drives to the first location. Since it is a new store she assumes that there will be some issues to discuss with the store manager. She decides to call the store and see if the manager will be there when she arrives. Luckily the manager is already there.

8:55 am Andrea arrives at the store. Her company tracks her time while at the store so she has to start the time tracker in her phone application. She also signs a log book in the store to show that she is there visiting the store.



9:00 am She heads to the printer section which is towards the middle of the store. She grabs her phone and brings up the checklist of questions she needs to answer about her visit in the store.

9:04 am The first question is about whether the printers on display have the correct price tags. As she walks around she notices that Model T6300 has no price tag.

9:15 am Andrea uses her camera on her phone and takes a picture of the display with the missing price tags. This way, if she comes back and it is



still not fixed she can show that it was like this the last time she visited.

9:20 am She then continues through the list of questions which require her to check if the promotional materials are displayed, if the printers are working, if they are in the appropriate location, if they have ink in them, if they are turned on, if they need dusting, etc.



9:35 am She does notice that there is no promotional sign on the end cap that is displaying the new line of printers.



9:42 am Andrea starts looking for the store manager and does not find him on the floor, so she asks the sales clerk to find the manager.

9:44 am The manager David Kim soon arrives. She tells Mr. Kim that there are no price tags on the Model T6300 and that there is no promotional sign on the end cap. He promises Andrea that these issues will be taken care of by the end of the day.

9:48 am She is required to get a signature from a manager before she leaves to show that she did her work. She asks David to sign using the signature capture technology in her application. She also notes in the application that Mr. Kim was the manager on duty, today's date, and she puts in her notes the lack of price tags.

9:52 am Andrea heads back to the front of the store where she signs out of the log book. She also stops the time tracker in her mobile application.

10:00 am She gets back into her car and starts driving to the second store on her route itinerary. While driving she gets a call from Eric Layton, the operations head at her company. He indicates that he needs to meet with her this afternoon regarding next month's promotion. They agree to meet at 1:30 p.m.

10:10 am Andrea arrives at the second store and parks her car.



10:14 am She enters the store and starts the time tracker in her phone application. She also signs a log book in the store to show that she is there.

10:20 am As Andrea is walking to the printer section, she grabs her phone and brings up the checklist of questions she needs to answer about her visit in the store.

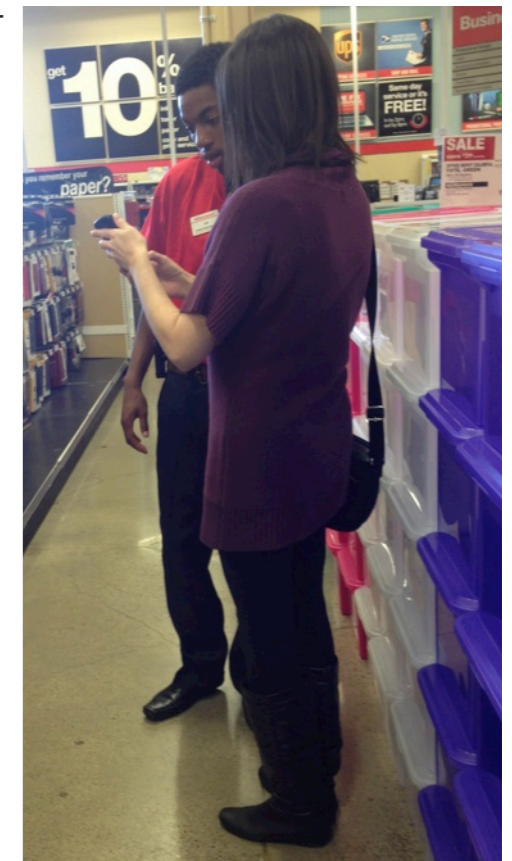
10:25 am As she is walking around to check the displays, she notices that material for an expired promotion



is still being displayed, she takes a picture of it with her phone camera and then takes it down.

10:36 am She finds Mr. Johnson, the store manager, and calls him over. Andrea tells him that he needs to put the new promotional information up.

She also comments that she noticed a lot of foot traffic in the front of the store. She asked if he can put up a display unit there. She tells Mr. Johnson that she is concerned that her competitor is making more sales in this store since they already have a display up front. At first, Mr. Johnson was hesitant because it already feels crowded up in that part of the store. However, they negotiated a small display space near the front of the store since it will help both of them with sales.



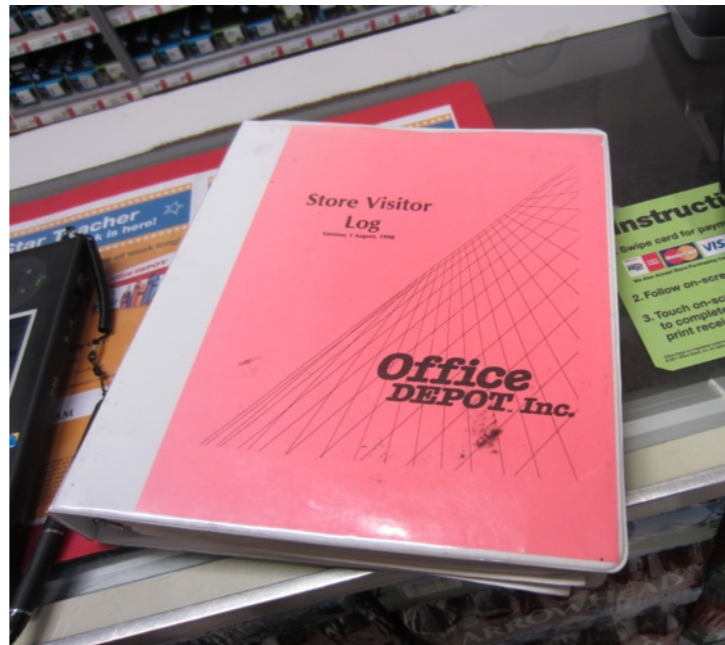
She asks Mr. Pantel for his signature through signature capture in the application to show she was there and did her work.

10:42 am Andrea is very impressed with the competitor's display. She grabs her device and takes a picture of the display and emails it to the marketing team.



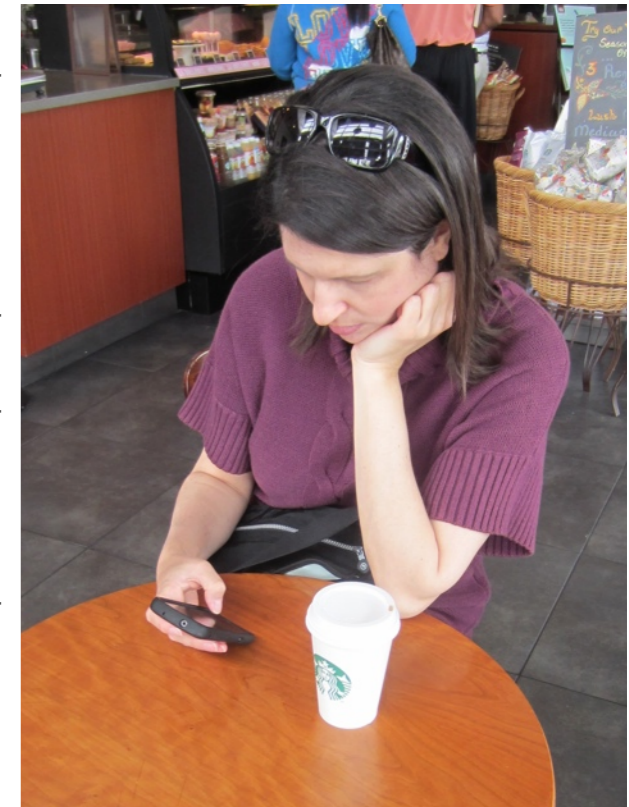
10:45 am While she has her mobile device out she goes back to the store in the application and notes what happened at the 2nd store and puts the manager on duty and the date, and puts notes about the agreement to have a small display put up. She also stops the timer in the application.

10:50 am She signs out of the log book at the front of the store and heads to her car.



11:00 am On Andrea's way to her next store, she decides to stop at Starbucks for a coffee break. Once she gets there she sends an email message on her phone to the marketing department letting them know that she needs a small display in the last store she visited.

She also reads a personal text message she got from her friend reminding her that dinner is at 7:00 at the Cheesecake Factory.



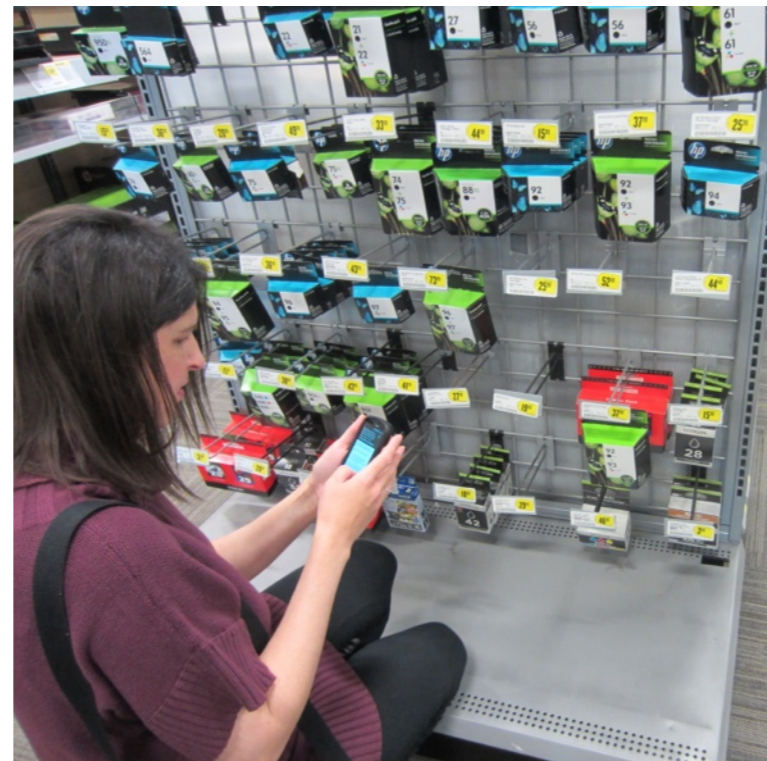
11:32 am Andrea gets back in her car and heads to the third store on her route.

11:40 am She arrives at the store, starts her time on her mobile application, brings up the store checklist and



and two left for the M700 model. She uses her device to order a case of each of these. It shows that it is in stock and will be delivered in two days.

heads to the printers. When she gets there she spends some time cleaning up the sloppy shelves.



11:50 am

When Andrea gets to the ink cartridge section she notices that

the shelves seem low for black ink cartridges for the T4300 and M700 series. She uses the bar code scanner to scan each of these items in and documents that there is only four left for the T4300 model



11:58 am

When she finishes placing the order for the store, she opens an alert on her phone that she noticed when she first accessed the store. The alert says to check with the manager to make sure that he received the collateral regarding the two display options available for the next promotion. She locates the manager, Mr. Williams, who tells her that he received the collateral. They review the two options and decide which one makes most sense for the store's configuration.

12:20 pm

She asks the manager for a signature to show that she completed the work. She turns off the timer on her application.

12:24 pm

Andrea leaves the store and goes back to her car. Once in the car she gets her phone and documents the manager on duty, the date, and puts notes about which display was chosen. She then starts the car and

head off to the 4th store that she will be visiting for the day.



12:40 pm

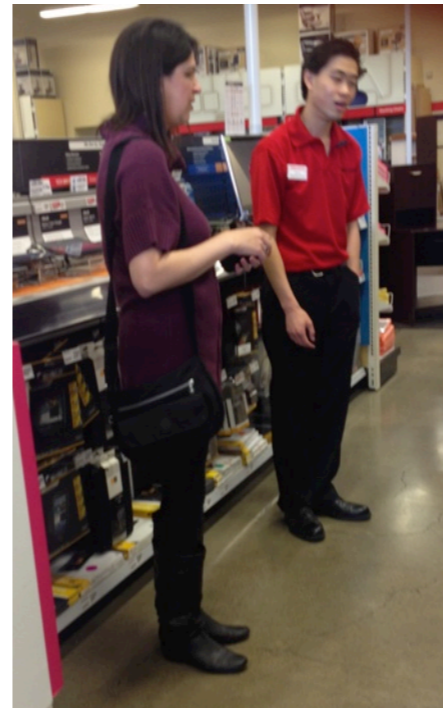
Andrea arrives at the 4th store. She turns on the timer on her mobile app, pulls up the checklist for the store.

As she walks around she notices that everything looks fine and that the store is doing a good job with the printer displays.

12:45 pm

She decides to check in with the manager and see how he is doing and if he needs anything. A clerk tells Andrea that Mr. Davidson is no longer there and that Ms. Wong has taken over. She meets Ms. Wong and introduces herself. They exchange business cards.

She also asks for a signature (using signature capture) from the store manager to show that she completed the work. She turns of the timer on her application.

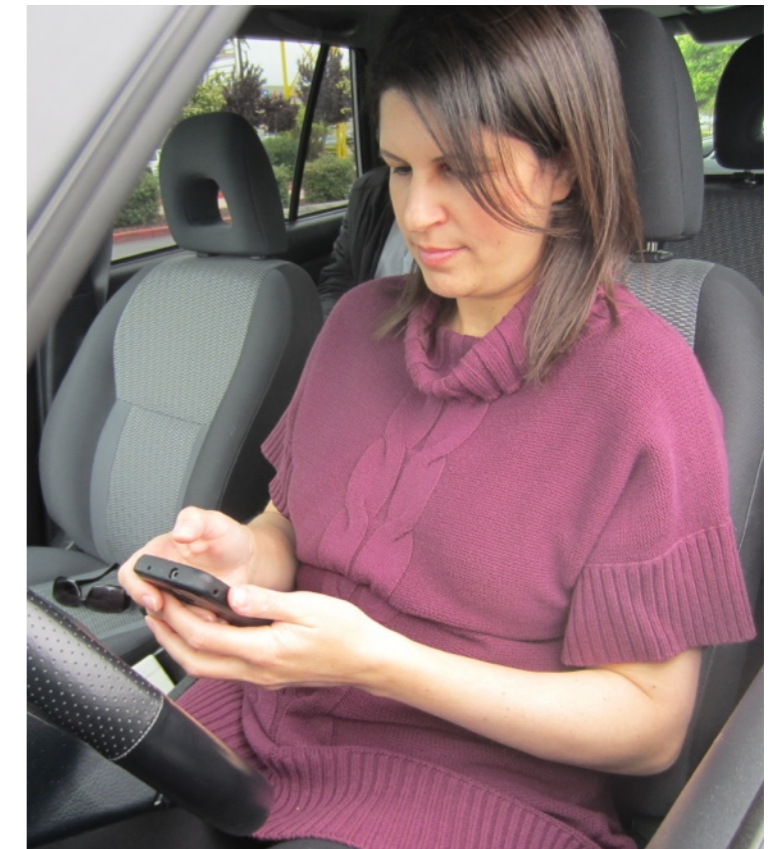


12:50 pm

Andrea leaves the store and stops at a nearby bench to document what happened during her visit. She gets out her phone, brings up the store and documents the manager on duty and the date. She also enters the contact information of the new manager.

1:00 pm

Andrea goes to the drive through at Burger King to pick up lunch on her way back to the office to meet Eric Layton, the operations head. She texts him to see if he'd like her to bring him something for lunch.



1:20 pm

Andrea arrives at the office and prepares for her meeting. Once that meeting is over she will visit some colleagues and then head home.

FUTURE ORACLE PRODUCTS

- Ability to take videos of stores to attach to the call reports in the enterprise application
- Integrate photo taking capabilities into the enterprise application so that the pictures can be tied to the call reports
- Bar code functionality to do inventory of items
- Ability to interface with store's inventory system, not all merchandise is on the shelves (if expensive or items are large). Then will know exactly how many are in stock.
- Voice functionality and voice recording functionality to be used to reduce typing on the keyboard.
- Mileage tracker
- Ability to order merchandise from the field

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Data Sources:

Persona based on observations made during research in India, Singapore, Sweden, China, and the USA

